

Instructions for Calculating Financial Aid Contribution from ND Division of Vocational Rehabilitation

Refer to VR's Policy Manual NDAC 75-08-01-30 for the complete policy on postsecondary training.

The starting point for calculating VR's participation in Postsecondary Training is the Financial Aid Award Notice/3rd Party Notification from the Financial Aid Offices. Students must obtain this information and provide it to the counselor.

1. Introduction

This worksheet is straightforward for schools that offer financial aid. See the instructions on Page 6 for non-traditional training programs, such as truck driver training, or welding schools.

One **must** complete the worksheet in Excel using a computer. Due to the embedded formulas, it cannot be done by hand on paper.

The Excel worksheet is located at: <P:\So Vocational Rehabilitation\VR Policies-Procedures-TAGs\SP 15-01 Higher Ed Worksheet.xlsx>. One can only enter data in the blue cells. One cannot enter or change the formulas in the yellow cells.

2. Identifying Information

Enter the student's name, school, term, year, and number of credits for the term.

Enter an 'x' for the type of term (semester, quarter, or other). If you select Semester, the minimum potential VR participation will be \$600/term. If you select Quarter or Other, the minimum potential VR participation will be \$400/term.

3. Budget Duration

Enter the number of months to calculate the Budget duration. Normally, the budget duration would be 9 (one year of school is 9 months). However, all authorizations for postsecondary education are currently for ONE semester only. Therefore, the budget duration for one semester is 4.5.

It is critical the budget duration number is correct, since it significantly affects the calculations that follow. **The majority of the time, the budget duration for a full time student for one semester will be 4.5.**

Enter **4.5** for one semester

Enter **3** for one quarter, for example, a term at Rasmussen or Minnesota School of Business.

If the student is taking less than 12 credits, that ratio must be applied to the budget duration. In certain circumstances, a counselor may decide to pay for less than 12 credits. For example, a counselor may choose not to pay for retaking a class that was failed, or not paying for a class not required in the degree plan.

This table shows the budget duration for 1 to 11 credits for **one semester**:

No. of Credits	Semester No. of Months	Formula	Budget Duration
1	4.5	$+4.5*(1/12)$.375
2	4.5	$+4.5*(2/12)$.750
3	4.5	$+4.5*(3/12)$	1.125
4	4.5	$+4.5*(4/12)$	1.500
5	4.5	$+4.5*(5/12)$	1.875
6	4.5	$+4.5*(6/12)$	2.250*
7	4.5	$+4.5*(7/12)$	2.625
8	4.5	$+4.5*(8/12)$	3.000
9	4.5	$+4.5*(9/12)$	3.375
10	4.5	$+4.5*(10/12)$	3.750
11	4.5	$+4.5*(11/12)$	4.125

*Use 2.250 for the budget duration for summer school for semester based institutions such as UND, BSC, Turtle Mountain, NDSCS, UTTC, etc.

This table shows the budget duration for 1 to 11 credits for **one quarter**:

No. of Credits	Quarter No. of Months	Formula	Budget Duration
1	3	$+3*(1/12)$.250
2	3	$+3*(2/12)$.500
3	3	$+3*(3/12)$.750
4	3	$+3*(4/12)$	1.000
5	3	$+3*(5/12)$	1.250
6	3	$+3*(6/12)$	1.500
7	3	$+3*(7/12)$	1.750
8	3	$+3*(8/12)$	2.000
9	3	$+3*(9/12)$	2.250
10	3	$+3*(10/12)$	2.500
11	3	$+3*(11/12)$	2.750

If the budget duration is less than 4.5, document how the number was calculated in the "Rationale & Notes" box.

4. Out of State or Private Universities

For most instances, leave this cell as n (for no). If, because of the student's disability or vocational goal, the only available postsecondary training is at an in-state private, or out of state institution, enter a y (for yes) in this cell, and document this in the "Rationale & Notes" box. If they are attending an out of state, or in-state private institution not due to the student's disability or vocational goal, leave the n (for no).

5. Expenses

Enter the Actual Expenses in the blue cells.

Tuition/Fees expenses are for one term, minus any waivers or discounts.

Enter the Books/Supplies expenses for one term. Do not leave this field blank. If there are no expenses for books and supplies, enter a zero.

Enter the Program Required Tools/Equipment for one term. Do not combine this amount into the Books/Supplies expense. The Books/Supplies amount has a maximum of \$600.

6. EFC for 1 term

Enter the Expected/Estimated Family Contribution (EFC) for 1 term. Many times an awards letter gives the EFC for the entire 9 months. You must calculate the EFC for one term. For example, if this is for one semester, divide the EFC in half, and enter the amount in this cell. The worksheet will calculate 75% of this amount and enter it in the Assistance section.

7. Total Cost for One Term

The total cost for one term is the sum of the "Amt. Used" column. The "Amt. Used" takes the Post-Secondary Rate amount or the Actual Amount, whichever is less, for Tuition/Fees and Books/Supplies (unless 'out of state or private' is designated y for yes). In either case, the maximum amount for books is \$600.

The Post-Secondary Rate is the highest in-state tuition rate for one semester, determined each year by the state office. If the budget duration is 4.5 (one semester), the rate is \$3910 for tuition and \$600 for books. If the budget duration is less than 4.5 (see section 3), the rate will be reduced by that same ratio.

8. Assistance

The 'Minus 75% EFC for 1 term is a protected cell. The amount is calculated by taking 75% of the EFC entered in step 6.

Enter the Grants for 1 term.

Enter the Non-merit Scholarships for 1 term. (Merit Scholarships are based on the student's academic and/or extra-curricular abilities and cannot be used as a comparable benefit.)

Enter Other Comparable Benefits (WIA, Military, etc.) for 1 term. Be sure to refer to WIA, when appropriate.

The assistance amounts are deducted from the total cost, and the difference is the 'VR Unmet Need for 1 term'. VR can assist up to this amount. If the VR Unmet Need for 1 semester is \$600 or less, the total potential VR participation will be \$600. If the VR Unmet Need for 1 quarter is \$400 or less, the total potential VR participation will be \$400.

Other Expenses for 1 Term

If the Unmet Need is less than \$600 due to a high EFC and not receiving grants, do not enter anything for Other Expenses.

If the Unmet Need is less than \$1,200 and the student is receiving needs-based Grants, VR may consider additional participation in special situations.

There are two situations where VR may consider additional participation. For those situations, there is an ability to enter up to \$1200 for Other Expenses when the budget duration is 4.5 (one semester). If the budget duration is less than 4.5, the amount you can enter is a ratio. For example, if a student is half time, you can enter up to \$600. Entering a number greater than the allowable amount will yield an error message.

Any amounts entered in the 'Other Expenses' cell must be documented in the "Rationale & Notes" box **and** be approved by your administrator with their signature at the bottom of the form. This amount would be applied toward tuition which saves you the work of creating additional authorizations.

The two situations are transportation if the student commutes to school from out of town, or, the student must pay for a second residence while attending school.

Example 1:

A student lives out of town, and Gasbuddy.com determined you can assist with transportation costs in the amount of \$200 per semester. Instead of writing separate monthly authorizations for gas, you would enter 200 in the 'Other Expenses for 1 term' cell. This will increase the Total VR Participation by \$200, and be applied towards tuition. Document this in the Rationale & Notes box and have it approved by your administrator.

Example 2:

A student is required to pay for a second residence, and needs assistance with room and board costs in the amount of \$800 per semester. Enter \$800 in the 'Other Expenses for 1 term' cell. This will increase the Total VR Participation by \$800, and be applied towards tuition. Document this in the Rationale & Notes box and have it approved by your administrator.

9. Loans

Enter amounts for Loans. These amounts are not used in the calculations, but are displayed as a counseling and guidance and informed choice tool for the counselor and student. If a student has been awarded unsubsidized and/or subsidized loans, and VR is participating in the cost of tuition/fees/books, the school will reduce the loan amount the student receives. Counselors will want to ensure the student is aware of that.

Unsubsidized loans – interest accrues while the student is in school.

Subsidized loans – interest does not accrue while the student is in school.

10. Rationale & Notes

Always document the following:

- If waivers or discounts were deducted from tuition/fees (show the actual calculation).
- If Other Expenses for one term were entered. This requires regional administrator's approval.

11. Signatures

The counselor signs the form.

The regional administrator must sign and approve all Higher Ed worksheets for the 2014-2015 school year.

12. Final Steps

Copies of the completed worksheet must be provided to the Student, SFA Office and Business Office.

- ✓ VR encourages all individuals to contribute toward their rehabilitation to the extent they can.
- ✓ Students cannot be required to take a loan.
- ✓ VR financial participation is always contingent on funds being available.

Nontraditional Training Programs

Cosmetology Schools

- Whether Cosmetology programs do or do not have Federal Financial Aid, clients who wish to attend must complete the FAFSA.
- Mark semester for the Type of Term.
- Mark the Out of State or Private cell as y (for yes).
- Each session should be calculated as a semester with the **Budget duration of 4.500.**
- Complete the worksheet as you would a state institution.

Lynnes Welding

- Clients who wish to attend Lynnes Welding must complete the FAFSA application.
- Always refer the client to WIA and other programs that may have comparable benefits such as Skill Build.
- Mark Semester for the Type of Term.
- Leave the Out of State or Private cell as n (for no).
- The 5 or 6 week programs will be considered as 2 semesters.
- **The Budget duration will be 9.00** (one worksheet will be completed for the 2 semesters). If you prefer you can make arrangements to make a payment at the halfway point as you monitor progress, arrangements will need to be made with Lynnes.
- If the Potential VR Participation is \$400, change it to \$800 since this is the equivalent of 2 semesters.
- **You will need to write this on the worksheet (the worksheet will not calculate for you).**
- Regarding room and board – Board will not be covered. Room will be covered when necessary as determined by the counselor and approved by the regional administrator.
- Be sure to review all cases with the Regional Administrator.

CDL (Commercial Driver's License)

- CDL training programs do not have Federal Financial Aid. However, clients must complete the FAFSA application to determine EFC.
- Always refer the client to WIA and other programs that may have comparable benefits such as Skill Build.
- Mark Semester for the Type of Term.
- Mark the Out of State or Private cell as y (for yes).
- The CDL programs will be calculated as one semester with the **Budget duration of 4.500.**
- Complete the worksheet as you would an out of state/private institution.

Other Schools

Clients must complete the FAFSA application to determine EFC for other schools that do not have Federal Financial Aid. Be sure to review these cases with the Regional Administrator.